



WITH



SanCap Solar Connect, LLC
P.O. Box 565 • Sanibel, FL • 33957
(239) 470-2144
jmccabe@sancapsolar.org

Request for Proposal

Issue Date: August 26, 2015

Return Date: September 15, 2015

Submit any questions about the RFP to Program Director, John McCabe by email jmccabe@sancapsolar.org. **SanCap Solar Connect** must appear in the email subject line. Questions will be accepted through September 11, 2015. (Cell 239 470 2144 if necessary)

We will respond in most cases within two business days, through September 11, 2015.

Final Proposals are due to the SanCap Solar Connect office no later than 4:00 pm on September 15, 2015. The proposal must be in electronic form and must include a completed **Pricing Proposal (Attachment B)**. Proposals should be submitted via email address jlathrop@sancapsolar.org with the **SanCap Solar Connect RFP Proposal** in the subject line.

We will be holding a site visit, including the staging area, on Wednesday, September 2, 2015 at 11 a.m. The meeting will be held at the J.N. "Ding" Darling National Wildlife Refuge Education Center (1 Wildlife Drive- Mile Marker 2, Sanibel, FL 33957). To confirm your visit, please contact Joyce Lathrop at jlathrop@sancapsolar.org.

SanCap Solar Connect, LLC and "Ding" Darling Wildlife Society thank you for your interest in participating in our solar electric program!

"Ding" Darling Wildlife Society
SanCap Solar Connect, LLC
One Wildlife Drive
P.O. Box 565
Sanibel, Florida 33957



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SanCap Solar Connect LLC

2015-2016

Request for Proposal

To: Installers of Residential and Commercial Solar Photovoltaic (PV) Systems

Posting Date: August 26, 2015

Response Due Date: September 15, 2015

The “Ding” Darling Wildlife Society, Inc. (DDWS), through SanCap Solar Connect LLC, is requesting proposals from Solar PV installers willing to offer discounted pricing for group purchase installations of solar PV in conjunction with its SanCap Solar Connect (SCSC) Program (the Program) located on Sanibel and Captiva Islands, Florida. SanCap Solar Connect builds upon the efforts of "Solarize" campaigns originating across the nation. In these campaigns a program sponsor--in this instance DDWS through SCSC-- partners with a selected solar installer to offer a special group purchase for solar systems. The program sponsor, with the installer's support, organizes a local marketing campaign to encourage residents and businesses to sign up for solar site assessments. This reduces the installer's operating costs and customer's acquisition costs by allowing the installer to share savings with participants in the form of bulk discounts. Typically, the solar installer offers tiered pricing for solar systems, that decline as more residents and businesses participate. Campaigns are coordinated over a period of several months, offering a time-limited offer that further incentivizes participation.

By educating the local community and leveraging community support for marketing efforts and sales, the Program seeks to increase demand for and lower the cost of residential and commercial solar PV systems.

Installers are encouraged to become familiar with the Solarize campaign model before submitting proposals. A general overview of the operation of these campaigns may be found at <http://www.nrel.gov/docs/fy12osti/54738.pdf>.

Marketing of the SanCap Solar Connect Program will target residents, organizations and businesses located on Sanibel and Captiva Islands; however, residents and businesses within approximately 20 road miles of Sanibel may also be eligible to participate.

To help generate interest in solar PV by individuals and businesses, the SanCap Solar Connect and DDWS teams, in conjunction with their selected Solar installer partner, will provide free educational and marketing support, including free meetings and marketing materials.

The SanCap Solar Connect Program is a DDWS Program provided through SanCap Solar Connect LLC . The “Ding” Darling Wildlife Society (DDWS) is a 501(c)3 Florida not-for-profit corporation, founded more than 30 years ago, to support the J.N. “Ding” Darling National Wildlife Refuge Complex in the areas of environmental education, visitor services, wildlife conservation, habitat restoration, land acquisition and overall environmental stewardship.

Applicant Eligibility

In order for an Installer to be considered eligible to submit a proposal, the Installer must:

- Demonstrate experience and proficiency in solar PV installations. The Installer must be a licensed General Contractor in the state of Florida who has installed a minimum of ten (10) solar PV systems in Florida. It is preferred that there be at least one PV installer on staff who is certified by the North American Board of Certified Electrical Practitioners (NABCEP).
- Include on the project team at least one electrician holding a valid and current Florida electrical license to perform any electrical work on the solar PV installations. The Installer must also have any additional license(s) required to work on Sanibel and Captiva Islands, as well as in Fort Myers, FL.
- Provide a formal business description of the Installer, including number of employees. Identify the number of full-time installers, site assessors and project managers in the installer’s business. Provide the Installer’s physical location, capacity for work, and access to various supply chains. Highlight relevant experience, skills and capabilities necessary to undertake this program. Installer should be ready to make available a reasonable number of installation references upon demand.
- Provide copies of any licenses of all key individuals on the project. **Installer is welcome to partner with other installer companies. However, one Installer must be the designated lead company on the proposal.**

- **Carry premium liability insurance coverage, and workmen’s’ compensation, any and all insurance policies required and/or necessary for the conduct of the installer’s licensed business.**

Scope of Work

1. **Provide an Implementation Plan** describing the Installer’s ability to offer and provide solar PV installation services during the Program period. Specifically, the proposal should describe the Installer’s ability to provide:
 - **Customer service**
 - **Site assessments**
 - **Installation services**

Please describe and elaborate upon:

- **The specific intake process for customer leads**
 - **Method for screening sites**
 - **The quality assurance process for the solar PV installations**
 - **The process for managing permits, inspections and interconnections**
2. **Provide expected timelines for customers** under the Program to guide community and customer expectations. Include time lines after receiving qualified customer leads to first contact, site assessment and final installation.
 3. **Staff Capacity:** Explain how Installer can expand capacity and maintain quality standards to meet potential large demand that may occur. Provide best estimates of the number of average installations the Installer can complete per week.
 4. **Tiered Price Structure:** Outline the Purchase Price based on total capacity (DC@STC) of solar PV systems contracted by the group using five tiers. * **See Attachment B** *
 5. **Permitting and Interconnection:** For each participating home or commercial building, the selected Installer will be responsible for securing all required permits. The Installer will manage the attaining of a net-metering agreement with Lee County Electric Cooperative (LCEC) or Florida Power and Light (FPL). The Installer will provide each owner with the information, documentation, and certified signatures required to complete the appropriate interconnection applications. The installer is also responsible for communications with the relevant power company to complete approval and system turn-on. The installer will arrange and manage all required inspections and give the owner prior notices. The installation will be considered complete when the system is approved by the relevant power company and is fully functioning.

6. Installer will agree to provide technical, personnel and related information during Solar 101 community meetings and other educational events.
7. Installer will provide weekly updates to SanCap Solar Connect regarding campaign progress and lead status. Weekly reporting must be submitted each Monday by noon for the previous week's work. Updates should include:
 - **Contact status: Date qualified lead was received. Date of first contact with prospective customer must be within 5 days of receiving a lead.**
 - **Date of scheduled/completed site assessment, which must be within 10 days of first contact**
 - **Date of contract signing**
 - **Date of scheduled installation**
 - **Date of targeted completion**
 - **Type of system installed**
 - **Size of system installed**
 - **Price of system installed**

The selected Installer will assist SanCap Solar Connect in determining the final customer enrollment date, providing a method for managing pricing and payment for early program installations. This date must allow full and complete installation to occur on or before September 15, 2016, before the federal tax credit program ends.

The Installer will be required to provide SanCap Solar Connect/DDWS with a final report outlining the total number of contracted customers within the community and the resulting tier pricing that will be associated with all installations completed by 9/15/2016, and those non-rebate projects completed after that date. This final report will be provided not later than November 1, 2016.

Additional Conditions for Customer Presentations

- **All Inclusive Pricing:** Pricing proposals must specify total installation costs, and be all-inclusive, to give a complete and finished project invoice cost. Costs must include, but are not limited to, system design, permitting, labor, materials and equipment, transportation, insurance, taxes, overhead and profit, and all equipment and workmanship warranties. The price should be independent of any tax credits, rebates or incentives available to customers. **The Purchase price for customers who decide to purchase a solar PV system should be presented on a \$/Watt basis. Qualified customers should have knowledge of their average Watt usage.** A copy of the standard agreement for purchase should be

submitted with the Installer proposal, outlining all terms and conditions for customers under the Program.

- **Price Contingencies:** It is understood that features of certain installations can result in higher costs. Installers must outline specific electrical, mechanical, structural, equipment, site or labor features that will result in greater costs. In addition, Installers must identify a maximum Purchase Price associated with more complicated installations and recognize and agree that an individual project price cannot exceed the base price (at the final capacity tier) plus the additional identified costs. Add-ons should be listed as flat costs. Installers will be responsible for identifying individual projects that trigger additional cost pricing.
- **System specifications:** Identify system specifications for equipment that will be used, including equipment manufacturers, models, and warranties for modules, inverters, racking, meter, and data acquisition systems, if applicable. Include a description of manufacturer qualifications and selected equipment.
- **Proposal for sites that are not feasible for solar PV:** Be prepared to offer advice to customers about other energy-saving products that the installer could provide at a later date, such as Solar Hot Water, or any other potential energy-saving products.
- **Customer Service:** Explain Installer's ability to handle customer service, including incident reports, warranties, service calls/costs, inquiries, response time on calls, hours of coverage, most common problems and reported issues, training provided to the customer for the system and customer care materials. May advise customer about participation in Better Business Bureau activities and notifications.
- **Maintenance:** Describe Installer's plan for addressing long-term service and maintenance issues.

Marketing Support: SanCap Solar Connect and DDWS Responsibilities

1. SCSC/DDWS will provide the Program a dedicated website and outreach materials.
2. During late September, October and November, and early December 2015, SCSC/DDWS and other project partners will vigorously promote and deliver a series of educational workshops at easily accessible public locations on the islands of Sanibel and Captiva, and areas within approximately 20 road miles of Sanibel Island. The selected Installer is expected to have staff available to answer questions and provide an interface to the community at major events and workshops. Installers are encouraged to provide additional training for the SCSC Program Director on the Installer's operations and other relevant topics.

3. Selected Installer will provide training to SCSC Program staffers to serve as their community contact for residents to answer common questions about solar PV systems, as well as available State and Federal incentives.
4. SCSC will manage Program media and outreach logistics to educate and promote the Program, including Solar 101 community educational workshops.
5. SCSC will provide the target market with materials such as flyers, educational tools and similar items at no cost to the Installer.
6. SCSC will convene weekly meetings or conference calls as necessary, to coordinate activities between the SCSC Program Director, SCSC Program Coordinator and Installer.

Evaluation Criteria

All proposals must meet SCSC/DDWS Program objectives and must be responsive to the relevant scope of work and proposal requirements outlined above. Proposals will be evaluated on and include the following:

- **Installer is a licensed General Contractor in the state of Florida specializing in solar PV installations and has installed at least ten (10) solar PV projects in Florida.**
- **Completed and signed Attachments A and B**
- **Program plan (scope of work)**
- **Tier-pricing (Attachment B) based on increases in total usage**
- **The proposed price to the customer decreasing in each of the five tiers. The price drop per tier can be different between each tier.**
- **Identity of any project price/cost add-ons and the range of any price escalators on Attachment B.**
- **Provide a template copy of a direct purchase contract with the customer specifying complete terms and conditions.**

The successful Installer will have these qualities:

- **Demonstrated overall quality and value**
- **Experience:** Degree of Installer’s experience and proficiency in the scope of work, including demonstrated experience in developing, designing and installing residential and commercial solar PV systems.
- **Implementation:** Ability to provide timely, quality customer service and installations, as well as the ability to work well with the community.
- **Price structure:** Purchase Price (\$/W) for increasing tiers of capacity contracted within the community. In addition, the value offered by the proposed equipment, price add-ons, contract terms and conditions.

See Attachment A

Upon the RFP review team’s selection of an Installer, SCSC will execute an agreement binding the Installer to the pricing, terms and conditions set forth in their proposal and will set forth the respective roles and responsibilities of the parties.

Waiver Authority

SCSC reserves the right, in its sole discretion, to waive minor irregularities in submittal requirements, to modify anticipated timelines, to request application modifications, to accept or reject any or all applications received, and/or to cancel all or part of the RFP at any time prior to its award.

Disclaimer

SCSC/DDWS has no financial obligation to any Installer arising from or as associated with this RFP. All contracts will be executed between the owner of a home or business and the selected Installer. The contract between the owner and the Installer will state that SCSC/DDWS is not a party to the contract and that the Installer will be solely liable for any and all claims, losses or damages arising out of the owner-installer contract. By submitting a response to the RFP, Installer agrees to these terms and conditions.



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SanCap Solar Connect Program

Attachment A– Agreement

This agreement (Agreement) sets forth the mutual understanding between SanCap Solar Connect LLC (“SCSC”), a Florida non-profit Limited Liability Company formed by the “Ding” Darling Wildlife Society (“DDWS”) and _____ (the “Installer”) regarding the Installer’s and associated team’s participation in the SanCap Solar Connect Program (the “Program”), effective as of September 15, 2015 (Effective Date).

1. Solarize Program

- a) Installer and SCSC agree to work cooperatively to implement the Program of SanCap Solar Connect specified in the RFP dated August 26, 2015 to drive community adoption of solar PV.
- b) Installer agrees that the term of this Agreement begins as of the Effective Date and will continue until December 31, 2016.

2. SCSC Commitment

- a) SCSC will assist the Installer and interested Sanibel and Captiva, Florida communities with marketing, outreach, Solar 101 educational workshop/s, and solar open homes.
- b) Coordinate meetings as necessary between SCSC and Installer, and as otherwise determined.

3. Installer Commitment and Deliverables

Installer agrees to meet the following terms and conditions for the duration of the Program:

- a) Cooperate and collaborate with SCSC.
- b) Provide customers in the community market with pricing available at the appropriate tiered level and provide tiered pricing reductions as outlined in Installer’s competitive bid to all customers under the Program. Appropriate tiered pricing must be applied to projects at the time contracted capacity

level is met for the tier. Installer's contracts with customers must clearly indicate that final pricing is dependent on the final SanCap Solar Connect pricing tier that is achieved;

- c) Track the pricing associated with each project, and justify in detail why any specific project requires any add-on cost;
- d) Track contracted capacity under the Program;
- e) Coordinate with the community market to recommend alternative opportunities for customers without feasible sites for solar PV project;
- f) Provide weekly metrics which include, but are not limited to, the number of leads generated, the number of feasible project sites identified, the number of contracted projects, and the tracked information maintained by Installer listed above in subparagraphs c) and d);
- g) Participate in appropriate marketing and outreach events within the community;

4. Terms and Conditions

- a) This Agreement may be terminated by SCSC at any time for a material breach of any part of the Agreement;
- b) All conditions, duties and obligations contained in this Agreement may be amended only through a written amendment signed by SCSC and Installer;
- c) Installer shall not assign or in any way transfer this Agreement without the prior written consent of SCSC.
- d) To the fullest extent permitted by law, Installer agrees to indemnify and hold harmless DDWS and/or SCSC, their officers, employees and volunteers and others working on behalf of DDWS and/or SCSC, against any and all claims, demands, suits or loss, including all costs connected therewith, and for any damages which may be asserted, claimed or recovered against or from DDWS and/or SCSC, their officers, employees, volunteers or others working on behalf of DDWS and/or SCSC, all liability, loss, claims, damages, fines, penalties, costs and expenses related to or arising out of the Program.

The undersigned is a duly authorized representative of the Installer with the authority to bind the company for the purposes set forth herein as associated with the SanCap Solar

Connect Program. The Installer has read and understands the RFP requirements. The undersigned acknowledges that all of the terms and conditions of the RFP are required and herein incorporated by reference thereto.

Installer certifies that the information contained in its Proposals or any part thereof, including exhibits, schedules and other documents or instruments delivered or to be delivered herein and/or otherwise associated with this Agreement, is true, accurate and complete.

SanCap Solar Connect, LLC:

By: _____ Date: _____

ACCEPTED AND AGREED:

Installer: _____

(Print Name of Installer Organization)

By: _____ Date: _____



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SanCap Solar Connect Program

Attachment B - Pricing Proposal

Please complete Attachment B or use this document as the basis for creating a separate table/chart. All the information requested to be included here must be in the same format if a separate table/chart is created and labeled "Attachment B." Installer must also include a template Purchase contract.

Primary Point of Contact

Installer Company Name	Contact Name
Contact Email	Contact Phone Number

Proposed Equipment

List proposed equipment for a typical solar PV installation. If more than one variety of equipment may be used, please include it below.

Major Component	Manufacturer & Country Where Equipment is Manufactured	Model Number	Warranty
<i>Inverter(s)</i>			

PV Modules			
Mounting System			
Production Meter			
Data Acquisition System (Optional)			

Tiered Pricing

	1kW-15kW	>15kW-50kW	>50kW-100kW	>100kW-200kW	>200kW
Price (\$/W)					
DC@STC					

Attachment B - Pricing Proposal continued

Increased Pricing Factors

Outline below any additional costs that may increase the tiered pricing proposal above. Identify a maximum price increase for projects under the Program.

Factors	Increased Cost (\$/W)	Increased Cost (\$/kWh)	Description of Work
<p>Site Specific</p> <p>May include, but is not limited to:</p> <ul style="list-style-type: none"> -Multiple roof arrays -Tilt racking -Standing seam metal roof -Flat roof -Pole or ground mounted system -Tree removal 			
<p>Structural</p> <p>May include, but is not limited to:</p> <ul style="list-style-type: none"> -Reinforcing rafters 			

<p>Electrical</p> <p>May include, but is not limited to:</p> <ul style="list-style-type: none"> -Electrical panel upgrade -Electrical subpanel -Meter Upgrade/change -Interior conduit run 			
<p>Monitoring</p>			
<p>Extended Warranty (if applicable)</p>			
<p>Maintenance (if applicable)</p>			
<p>Other</p> <p>May include, but is not limited to:</p> <ul style="list-style-type: none"> -Additional cost micro-inverters -Steep roof / tall roof (define) -Cedar Shingles 			

-Slate Roofs			
Total Additional Cost			

NOTE: Pricing proposals must specify total installation costs and be all inclusive to give a complete and finished project invoice cost. Costs must include, but are not limited to, system design, permitting, interconnection, labor, materials and equipment, transportation, insurance, taxes, overhead and profit, and all equipment and workmanship warranties. The price should be independent of any tax credits, rebates or incentives available to the customers.